KPMG Consulting
Barents Group

# Training of Trainers

# Curriculum Development

# Participant Guide

*December 2001*

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## COURSE SUMMARY

# DEF

*Introduction*

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**INTRODUCTION**

# Introduction

## Overview

This Training of Trainer's curriculum development course is designed to help curriculum designers revise or create effective and dynamic courses. Effective Design and Development of training courses ensure that the courses are worth the investment of the National Banking College as well as the participant's time. Effective design includes effective planning of the intended outcomes from training, assessment of existing skill and knowledge levels versus desired skill and knowledge levels, and creating training that closes the gap between actual and desired skill and knowledge levels.

## Learning Objectives

Upon the completion of this module, participants will be able to:

- ♦ Explain the course design and development process.
- ♦ Conduct a training needs assessment.
- ♦ Design activities for training that will create learning that meets learning objectives.
- ♦ Write learning objectives that are measurable.
- ♦ Explain the importance of varied learning methods and create training activities using those varied learning methods.
- ♦ Write course content that supports learning objectives.
- ♦ Write effective overviews and summaries of content.
- ♦ Write effective Instructor Guide.
- ♦ Create transparencies and visuals that support learning objectives.
- ♦ Explain the Return on Investment of training.

## Exercise

The goal of this course is to provide tools and reference materials that can be used later to produce high-quality and consistent training materials. Throughout this course, you will be asked to complete numerous exercises (or activities). In order for the exercises to be meaningful and provide skills that you need to perform design and development tasks, some of the activities are to be based on a course that you plan to create.

At this time:

1. Select a ***course*** or ***workshop*** you would like to work on during the course. This active participation gives you the opportunity to apply more of the information that is offered later in the course.

2. Select a single ***module*** within the course or workshop. Try to choose a module that will be short and has content that the entire group can understand.

3. Obtain ***approval*** from the Instructor to work on the course or workshop and module during the training class.

## Summary

In this module, you learned:

- The purpose, objectives and priorities of the Curriculum Development Course.
- The importance of participating in activities and preparing for class by identifying a course to work on in this class.
- An overview of the curriculum design and development process.

The information that you have received in this module should ensure that the rest of the course is meaningful to you.

# Module 1:

## *Training Needs Assessment*

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**MODULE 1: TRAINING NEEDS ASSESSMENT**

# Training Needs Assessment

## Overview

The training needs assessment is the process of gathering information from various sources and using that information to determine what the contents of a training program should be. The information gathered should consider the goals of the training, who the audience is and the knowledge and skill level of the audience.

A needs assessment should measure performance gaps to determine what is required in the training. The performance gap is the difference between the desired and the existing skill and/or knowledge required to accomplish the goals of the training being developed.

The training needs assessment process reveals barriers to high performance. Sometimes the barriers are caused by the lack of skills and knowledge. These needs can be solved by training, or by providing the opportunity for employees to learn the skills and knowledge. Sometimes other barriers prevent high performance, like the lack of equipment, facilities or motivation. Training does not promise the solutions for those barriers.

## Learning Objectives

Upon the completion of this module, you will be able to:

- ♦ Describe the steps in the training needs assessment process.
- ♦ Explain how to gather information required for the training needs assessment process.
- ♦ Write a plan for a training needs assessment.
- ♦ Determine whether training is the appropriate action to alleviate a performance gap.

## Training Needs Assessment Process

A training needs assessment is a process for determining if a performance gap exists and training is needed. Follow these steps to complete a training needs assessment:

1. Identify the work requirements for participants that will attend training.
2. Determine the skills and knowledge needed to accomplish the goals of the training class that will enable participants to perform their jobs.
3. Determine the existing skills, knowledge and performance of employees or training participants.
4. Identify the difference between the desired and the existing skills and knowledge or the performance gap.

## Identifying Job Required Skills and Knowledge

The following are some examples of ways to identify skills and knowledge required to do certain jobs. Skills are defined as performing activities required to conduct job processes and achieve desired results. Knowledge is defined as comprehending and applying theoretical and conceptual bodies of technical, scientific and other specific information. Other methods of gathering data may exist.

- Interview appropriate groups of employees to determine what skills and knowledge they use on the job.
- Interview top performing employees about what they do, why and how they do their jobs. Probe for the skills and knowledge that top performers use that average performers do not use.
- Observe the employees performing the job. Watch for the skills and knowledge used.
- Interview the manager about what he or she thinks the employees ***should*** do on the job, and about any expected changes in job requirements in the future.
- Research on the Internet or other sources to discover/determine what skills and knowledge are required to do the job that is the subject of the training.

## Methods for Gathering Training Needs Assessment Information

To gather the information about a performance gap and identify the cause, use one or more of the following methods:

- Interview the manager.
- Interview the employees performing the job. For ten or fewer employees, you may want to interview all of them individually or have one meeting with the group. For a group of 11 to 30 employees, you can select a sampling of six or seven employees to interview. Prepare the interview questions before you start. *(Sample questions are on the next page.)*
- Distribute questionnaires to the manager and employees to find out the cause of the problem. A questionnaire accomplishes the same objective as interviews. It is used in addition to, or instead of, interviews if you need the training analysis information from a large group or a group working in several locations. *(Sample questions are on the next page.)*
- Interview the experts -- persons who have done the job successfully or managers who have solved the problem before.
- Observe the employees doing the work to see if you can spot the cause of the performance problem.
- Research the "best practices" from other countries. Perhaps another country has already solved the problem and can share the solution with you.

### *Sample Questions for the Needs Assessment Interview or Questionnaire*

1. Describe your work and how you perform it.  (Including special forms, equipment and supplies.)  Tell me what you do first, second, third -- through the entire work process.

2. How long have you done this work?  How frequently do you do it?

3. What is the easiest part about the work?

4. What is the hardest part about the work?

5. What obstacles prevent you from doing a better job?

6. Why is the work important?

## Determining the Performance Gap

Follow these additional steps to determine the performance gaps in the individual or work group.

1. Analyze the difference between the skills and knowledge used by top performers and those used by average performers.

2. Analyze the difference between the skills and knowledge ***used*** on the job and those ***needed*** on the job.

3. Describe the difference between the skills and knowledge ***used*** on the job now and those that will be ***needed*** when the job changes (new responsibilities, procedures or equipment).

## Exercise: Training Needs Assessment Case Study

***Instructions:***

1. Think of several examples of performance gaps in a bank that might be improved with training.
2. Decide to use one of these examples to prepare for your Case Study.
3. Answer the questions on the next page.
4. Share your answers with another participant.

### *Case Study Description:*

Make notes here about the example you have chosen to use for the Case Study.

1. What are the work requirements for this particular job function and situation?

2. What are the skills and knowledge needed to accomplish the work?

3. What are the existing skills and knowledge of the employees?

4. What is the "Performance Gap" (the difference between the desired and existing skills, knowledge and performance)?

5. What is your recommendation for Training Needs Assessment methods and process.

## Performance Analysis Model

Once you identify a performance gap, you then determine the best solution to improve performance. The first step is to determine whether the gap is important or significant. If it is important enough to address, then determine whether the gap is caused by a skill or knowledge deficiency. If a skill or knowledge deficiency is evident, then training is probably a good solution. If the gap is caused by other issues or circumstances, training may not be the best solution.

### *Important?*

If not important, ignore the performance gap. If the gap is important, then ask the next question.

### *Is the gap caused by a knowledge or skill deficiency?*

If the gap is caused by a knowledge or skill deficiency, then move to a training solution.

### *Training Solutions*

- If the person or group has never performed a certain job task before, then ***train.***
- If the person or group has never performed the certain job task before but not often or lately, arrange ***practice.***

If the gap is ***not*** caused by a knowledge or skill deficiency or if training cannot improve the performance, then move to recommending management solutions. Management solutions are the actions that ***only the manager*** can influence to improve the performance and narrow the performance gap. The manager should consider taking some of the actions described below.

### *Management Solutions*

- ***Communicate and clarify performance expectations***. If bankers do not know that they are expected to use certain knowledge or skill, they may not. Informing them about job expectations (standards, objectives, policies and procedures) can quickly cure a performance gap.

- ***Provide a supportive work environment.*** Work groups should have the policies, procedures and resources to do their jobs. If ***doing the work*** is punishing, the punishment should be removed to provide ***incentives and positive rewards*** for doing the work. If ***<u>not</u>*** ***doing the work*** is rewarding, remove the rewards for not performing. Encourage and recognize consistent good performance.

- ***Arrange consequences***. Provide frequent feedback and coaching to direct and correct performance. Provide positive recognition and rewards for consistent good performance.

- ***Remove obstacles***. If a group is delaying the work coming to your area, work with the manager of the other area to solve the problem and remove the obstacle to good performance. Ask employees what obstacles prevent them from top quality and quantity performance. Work to address those obstacles.

- ***Determine whether the employee is in the most suitable job***. If none of the training or management solutions improve the employee's performance and closes the performance gap, consider whether the employee is in the right job. A manager should check the employees' skills and knowledge to see whether they match the job requirements. Perhaps the individual is placed in a job that does not fit the person's capabilities.

## Case Study: Performance Analysis

***Instructions:***

Review the situation described below and answer the questions that follow.

### *Scenario*

The Commerce Bank is located downtown. The bank is very busy, especially at lunch time. Customers come in monthly to get money to pay their utility bills. Many of these customers like to be waited on by Kate. She has been with the bank for a long time and works very fast.

In the last six weeks Kate's cash drawer has been out of balance at the end of the day almost twice as much as usual, and customers are starting to complain that she takes too long to process transactions. The customers have threatened to move to another bank. Kate's supervisor is concerned that Kate is making too many mistakes.

### *Other Information for the Scenario*

In the past two weeks, the bank has added some new forms that need to be completed with each transaction. Kate attended training to learn how to complete the forms. Kate's supervisor has checked the forms that she has completed, and has found errors in them. Kate's supervisor started work about seven months ago. No matter how hard Kate tries, her supervisor seems to find something she does wrong. Kate wants to make sure she completes the forms correctly, but doesn't understand how important they are.

1. Describe the Performance Gap(s).

2. Is the Performance Gap(s) important? Why? Why not?

3. Is the Performance Gap caused by a knowledge or skill deficiency?

4. List possible training actions.

5. List possible management solutions:

    a. Communicate and clarify performance expectations

    b. Provide a supportive work environment

    c. Arrange consequences

    d. Remove obstacles

    e. Check job fit

    f. Other management solutions

6. If more than one possible solution exists, indicate which solutions will be the most effective:

## Summary

In this module, you learned some methods for training needs assessment and performance analysis.

In this module, you learned to:

- Describe the steps in the training needs assessment process.
- Explain how to gather information required for the training needs assessment process.
- Write a plan for a training needs assessment.
- Determine whether training is the appropriate action to alleviate a performance gap.

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# *Module 2:*

*Designing Courses*

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**MODULE 2: DESIGNING COURSES**

# Designing Courses

## Overview

Careful course design and development can make the difference between a great course and an ineffective course. A sound development process and well-devised course and module plans are essential tools for creating a great course.

## Learning Objectives

Upon the completion of this module, you will be able to:

- ♦ Explain the course development process.
- ♦ Use the Course Design Worksheet to design and develop effective training courses.

## Course Elements

Elements that should be included in a course to ensure good learning design characteristics are:

- Cover page.
- Table of contents.
- Course overview and learning objectives.
- Introduction of the Course.
- Modules/chapters (course content) that include interactive learning activities.
- Summary of the course.
- Glossary, forms, and exhibits (as required and time permits).

## Module Elements

Each course should be divided logically into smaller "pieces" of information. This method allows participants to learn a number of smaller pieces of information and then fit the pieces together to form a single concept or idea.

Each module should include the following elements:

- Learning objectives.
- Overview of the module.
- Sequence of activities and associated content.
- Practice activities (exercises, case studies, role plays, etc.).
- Resources (transparencies, handouts, flipchart information).
- Summary.

## Course Development Process

Following a set development process ensures that no steps are alleviated in the design and development process. The steps for the course design and development process are outlined below.

### *Steps in the Development Process*

1. Create measurable learning objectives based on the outcomes or goals that learners should achieve as a result of attending training.
2. Conduct a Training Needs Analysis based on the learning objectives that compares current level of knowledge and skill of the training audience to the level of knowledge and skill described in the learning objective.
3. Gather all the existing information for the course (notes on required revisions, existing participant and leader manuals, word processing files, etc. for existing courses; resource materials for new courses).
4. Review the materials.
5. Create an outline for the course by breaking the course materials into logical "pieces" and flow of information. These "pieces" become the course module or modules. Ensure that the "pieces" are small and manageable. Shorter modules prevent students from becoming bored and make the information easier to understand.
6. Prepare a plan for the course, using the outline as a guide. The plan should identify specific course content and learning activities that support learning objectives and the logical organization of content.
7. Use the plan, write/edit the course content.
8. Submit the draft (electronic copy if possible) to a subject matter reviewer or editor.
9. After the reviewer/editor reviews the course for accurate content, the draft should be returned to the developer for review and revision.

> ***Note:*** *The next topic in this section presents a Course Design Worksheet. The worksheet is a tool that can be used to create a plan for any program.*

## Course Design Worksheet

A Course Design Worksheet is the blueprint that describes the content and activities in the course that support the learning objectives of a course. The Worksheet serves as a roadmap for developing content and activities that need to go in a course.

The Course Design Worksheet is a tool that can be used to create a lesson plan and help organize course content into logical chunks of information. The Worksheet is divided into sections, each outlining specific information about the course or a module of the course. The information in the worksheet can be used to write and organize the course content.

### *Course Section*

Review the following sections related to the course on the Module Plan Worksheet.

- ***Course Title***: Name of the course, as it should appear on all course materials.
- ***Duration:*** Total amount of teaching time for the course.
- ***Course Objectives:*** Sound, learning objectives of the course.

### *Module Section*

Review the following sections related to a chapter on the Course Design Worksheet.

- ***Module Number:*** Number that defines the sequence in which the module should appear in the course.
- ***Module Title:*** Name of the module, as it should appear on all course materials.
- ***Duration:*** Total amount of teaching time for the module.
- ***Course Objective:*** Course objective that should be learned upon completion of the module content.
- ***Module Objectives:*** One or more learning objectives for the module.
- ***Sequence of Activities:*** Definition and sequence of the learning methods to use to achieve the course and module objectives and the associated content to meet each objective.
- ***Resources:*** A list of resources (transparencies, handouts, audio/visual aids, etc.) required to perform the activities outlined in the ***Sequence of Activities*** section.

## Course Design Worksheet - Example

| **Course Title:** Operations of the Investment Industry | **Duration:** 10 days (6 hours per day) |
|---|---|

**Course Objectives:**

Upon completion of this course, participants will be able to:

*Introduction*: Introduce and assess individual's knowledge of the operations of the investment industry.

1. Explain the structure and functions of an investment dealer.
2. Describe the functions and importance of back office operations for the success of the investment dealer.
3. Explain the structure, function, processes and financial reports for dealer and broker accounting.
4. Explain the functions and processes for the trading department.
5. Explain the importance and function of the client-salesperson relationship and the sales process.
6. Explain the advantages, considerations and processes for issuing company shares on the public market.
7. Explain the processes included in executing a Securities Selection Plan.
8. Explain modern portfolio management theory and practice.
9. Explain how to operate a securities dealer or broker, including strategic planning, financial management, controls and maintaining capital adequacy.

*Conclusion:* Assess the application of the concepts and principles taught in the course.

## Module Plan - Example

### *Module 4*

| **Module Title:** | **Module Duration:** |
|---|---|
| Trading Department | 3 hours |

**Course Objective:**

Explain the functions and processes for the trading department.

**Module Objectives:**

Upon completion of this module, participants will be able to:

1. Describe the structure of the trading function.
2. Describe the purpose and function of principal trading.
3. Describe the order flow for trades.
4. Describe key management issues/concerns for the trading function.

**Sequence of Activities:**

1. Present module objectives.
2. Present the structure of the trading function.
3. Lecture: Description of agency services, principal trading, order flow and block trading.
4. Lecture: Key Management issues/concerns for the trading function.
5. Exercise – entire class —Management Issues Discussion: Class discusses the importance of awareness of issues/concerns discussed.
6. Summarize and answer questions about the module.

**Resources:**

Exercises —located in participant manual

Transparencies:

Module Title (OH-)

Objectives (OH-)

Management Structure of a Dealer (OH-)

The Services Rendered: Sales of Agency Trading (OH-)

The Services Rendered: Principal Trading (OH-)

Order Flow (OH-)

Block Trading (OH-)

Trading Management Issues (OH-)

Learning Objectives (OH-)

## Course Design Worksheet

| **Course Title:** | **Duration:** |
|---|---|
| **Course Objectives:**<br>Upon completion of this course, participants will be able to: | |

## Module Plan

### *Module ___*

<table>
<tr><td>Module Title:</td><td>Module Duration:</td></tr>
<tr><td colspan="2">Course Objective:</td></tr>
<tr><td colspan="2">Module Objectives:<br>Upon completion of this module, participants will be able to:</td></tr>
<tr><td colspan="2">Sequence of Activities:</td></tr>
<tr><td colspan="2">Resources:<br>Exercises —located in participant manual<br>Transparencies:<br>Module Title (OH-)<br>Objectives (OH-)<br>Learning Objectives (OH-)</td></tr>
</table>

## Exercise: Starting a Course Design Worksheet

***Instructions:***

In this exercise, start a Course Design Worksheet for the course that you chose to work on during the course. You will use the Course Design Worksheet you begin in this exercise throughout this course. Your course should have been approved by the Instructor.

1. Obtain a copy of the Course Design Worksheet from the Instructor.
2. Enter the course name on the worksheet.
3. Enter the name of the module you selected to work on during the training on the worksheet.

## Summary

In this module, you learned:

- To identify the elements that should be included in each course and course module.
- The steps in course development.
- The purposes of a course design document.
- How to begin a Course Design Worksheet.

What you have learned in this module should help you plan effective courses and units or module within those courses.  The Course Design Worksheet can serve as a guide to complete the design and development process.

# *Module 3:*

*Learning Objectives*

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# Learning Objectives

## Overview

Learning objectives are statements that describe what learners should be able to do upon the completion of a course or module. Objectives are a guide to content and activities that should be included in training.

## Learning Objectives

Upon the completion of this module, you will be able to:

- Define the two types of objectives that should be included in every course (course and module).
- Explain the purpose of course and module objectives.
- Describe what elements go into writing a good learning objective.
- Write a meaningful, performance-based learning objective.
- Complete the applicable portions of the Course Design Worksheet.

## Types of Learning Objectives

Two types of learning objectives should be included in every course. These types are described below:

1. ***Course Objectives****:* Provide the learner with a clear understanding of what he/she will understand or be able to perform as a result of the training. The course objectives are a cornerstone in determining how the course will be designed.

2. ***Module Objectives:*** Provide a detailed look at what will be presented in each module. These objectives should relate directly to the course objectives; however, they should be presented as smaller pieces of information that are easier for the learner to grasp.

## Elements of a Good Learning Objective

Learning objectives should be provided to learners at the beginning of each course and before each module. The objectives provide the learner with a clear understanding of what he/she will understand or be able to perform as a result of the training. When writing learning objectives, keep the following criteria in mind.

- Keep statements short and simple.
- Avoid excessive detail.
- Do not use the objectives to talk about instructors, trainers, the training process, or the learner population.
- Distinguish between activities and objectives (for example, "Read pages 10-25 of the "Teller Operations Manual" is a training activity; "Complete an error transaction" is the objective or end result of the learning).
- Distinguish between descriptions and objectives. Descriptions explain course content; objectives tell what should be accomplished.
- Make sure the objective defines the outcome of the training without describing the means to those outcomes.
- For each objective, specify the action that must be taken, the conditions under which the action should be performed, and the criteria or standards that the performer must meet to accomplish the objective successfully.
- Ensure that the objective states to learners precisely what is expected of them.
- Be specific, but not excessively detailed. The scope of an objective depends on the purpose or subject of the particular objective.

## Writing an Objective

Perform the following steps to write a good learning objective.

1. Start by asking yourself, "What should the learner be able to do by the end of the training period?"

2. Begin the objective with a verb and an object, e.g., type a letter, write a report. The subject "you" is understood.

3. Use action verbs to describe what must be learned by the participants (i.e., operate, collect, list, define, etc.).

4. Follow the verb with a description of what is being treated (operate a computer, complete a report, etc.). The combination of the action verb and the description essentially state what the learner must accomplish.

5. Add conditions by answering questions such as:
   - "Will the equipment be available?"
   - "What are the time limits?"
   - "What resources will be used?"

6. If the course has proficiency requirements, build the competency standard into the objective (for example, process 100 items per hour).

7. When describing a concept that a learner must understand, begin with "explain," since explaining is an indicator of understanding.

### *Examples*

The following are examples of good learning objectives:

"*Complete a security check of the main offices within ten minutes.*"

"*Enter the monthly sales figures into a predefined Excel worksheet.*"

"*Record a loan payment in the bank's new loan system.*"

## Exercise: Writing Learning Objectives

***Instructions:***

1. Using the information presented in this module as a guide, write ***three*** learning objectives for the module you have chosen to work on for this course.
2. Record the objectives in the Course Design Worksheet and the Module Plan that you started earlier in this class.
3. The instructor will review the objectives you have written.

1. ______________________________________________

______________________________________________

______________________________________________

2. ______________________________________________

______________________________________________

______________________________________________

3. ______________________________________________

______________________________________________

______________________________________________

## Summary

In this module, you learned:

- To define the two types of objectives that should be included in every course (course and module).
- The purpose of course and module objectives.
- The elements required for writing a good learning objective.
- How to write a meaningful, performance-based learning objective.
- To complete the applicable portions of the Course Design Worksheet.

# *Module 4:*

## *Instructional Methods and Activities*

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**MODULE 4: INSTRUCTIONAL METHODS AND ACTIVITIES**

# Instructional Methods and Activities

## Overview

A variety of instructional methods can be used to convey information and instruct learners. In a training situation, the instructional methods selected for the course should provide an environment and an opportunity for learning to occur. Methods of instruction should be selected based on the learning objectives of the course and the training audience.

## Learning Objectives

Upon the completion of this module, you will be able to:

- ♦ Describe why a variety of learning methods are important in a training program.
- ♦ Describe six types of effective learning methods.
- ♦ Write an effective case study.
- ♦ Complete the applicable portions of the Course Design Worksheet.

## Choosing a Learning Method

Some people learn best by reading information (like a book); some learn best by hearing information (like a lecture); some learn best by hearing and seeing (like a video, movie or television); and most learn best by doing. Learning by doing includes, feelings, moving and often simulates reality. Therefore, case studies, simulations and skill practice are highly effective methods for learning.

Since people learn in different ways, a variety of training methods should be used in each course. Learning will be more effective if learners do not become bored. To ensure that the majority of learners are receiving and retaining the maximum amount of information possible during a training session, it is best to include a combination of training methods in each course developed.

When determining which learning methods to use in a course, consider the following factors:

- ♦ The number of persons to be trained.
- ♦ Ability of the participants to leave their jobs for training.
- ♦ Previous experience and knowledge of the learners.
- ♦ The desired results of the training (skills, knowledge, and/or attitude).
- ♦ Need of the learner to interact with other people for ideas and practice with skills.

## Training Methods

| OBJECTIVES | METHODOLOGY | EXAMPLE | AUDIENCES | REASONS TO USE | REASONS NOT TO USE |
|---|---|---|---|---|---|
| ♦ Acquisition of knowledge<br>♦ Practice of skills<br>♦ Understanding the effect of limited attitudes of trainee | ***Self-Study*** | | | | |
| | Written | Books, booklets, etc. | All levels | Easy; inexpensive set-up | Little or no control of quality |
| | Audio | Cassettes and text | Junior/mid levels | Can affect large groups | Expensive or mass quality control |
| | Visual | Video cassettes and text | Junior/mid levels | Limited up-front participation of experts | Impersonal, cold |
| | Audio Visual | VCR tapes and text | Mid/senior levels | Flexible delivery | Rigid content |
| | Computer-assisted | Programmed instructions | Junior/mid levels selected* | Easy to upgrade/update | Fast obsolescence of hardware/software |
| ♦ Acquisition of limited knowledge<br>♦ Limited practice of certain skills<br>♦ Understanding the effect of some attitudes of trainee | ***Group Study*** | | | | |
| | Lecture | Conferences, speeches | Mid/senior levels | Focus select groups | Expensive |
| | Round-table discussion | Workshops, retreats | Senior level | Depth in accordance with group | Questionable transfer to work |
| | Simulations | Case studies, role plays | Junior/mid levels | Relevant, customized | Limited applicability |
| | Moderation | Interactive discussions | Mid/senior levels | Participative, raises several relevant issues | Highly dependent on instructor |
| | Coaching | Involvement with experts | Junior/mid levels | Direct, focused | Can be lowered to the level of least qualified people |
| ♦ Acquisition of focused knowledge<br>♦ Practice of specific skills<br>♦ Application of specific attitudes | ***On-The-Job Training*** | | | | |
| | Relations | Work assignments | Mid/senior levels | Reasonable costs | Disruptive in both locations |
| | Coaching | Sit with another worker | Junior level | Interactive, comprehensive | Expensive, time consuming |
| | Work teams | Work team meetings | Junior/mid levels | Focused, tailored | Burdensome to senior members |
| | Train by fire | Trial and error | Mid/senior levels | Requires ingenuity; strengthens performer | Dangerous; stressful |

* Computer literacy required

## Case Studies

In case studies participants learn from their own experiences, the experiences of other participants, and the instructor or facilitator. Case studies should simulate real-life situations. When structuring a case study, consider the following seven steps:

1. ***Select an issue*** **-** Select an issue that is important and relevant to the learner and the learning objective.

2. ***Select the incident or situation*** **-** Determine how you are going to approach the issue you have selected. For example, if you are teaching hiring practices, your situation could be conducting an interview.

3. ***Provide sufficient details*** **-** Provide sufficient information about the roles, objectives, and details of the situation that participants can make good, informed decisions.

4. ***Identify and communicate the outcome you want*** **-** Inform the participants exactly what they are expected to produce during the activity.

5. ***Set the group size*** **-** Determine the optimum group size by answering the following questions:
   - Will participants complete the activity as a group?
   - Can the activity be performed in pairs?
   - Should the case study be completed by each participant individually?

6. ***Set the mix*** **-** Determine the composition of your groups. Will men and women, management and subordinates, people performing like tasks, etc. work together?

7. ***Set your time limits*** **-** Determine the amount of time that participants should spend answering the case study questions. Also determine at what time you should prompt participants to finish up their discussions.

## Exercise: Writing a Case Study

***Instructions:***

Using the information presented in this module as a guide, write a case study for the course/module you are writing.  Be prepared to explain your case study to the rest of the class.

## Exercise: Completing the Module Plan

1. Using the information presented in this module, describe activities/methods for the module you are currently developing. Place the information in the Module Plan.
2. Be prepared to share with another partner.

## Summary

In this module, you learned:

- Why a variety of instructional methods are important when designing training.
- Which learning methods may be effective in your training environment.
- How to write an effective case study.
- To complete the applicable portions of the Module Plan.

This information helps you include a variety of activities in your training to ensure that it is interesting and effective. In addition, this module helps you to use the appropriate activities for each learning situation.

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# Module 5:

## *Course Content*

# Table of Contents

**MODULE 5: COURSE CONTENT**

# Course Content

## Overview

Writing and editing content so information is clear, concise, and relevant to the learner ensures course success. Information should be presented in an interesting way that motivates the learner to participate and understand. In this module, you receive some tips and guidelines that help you write the content.

## Learning Objectives

Upon the completion of this module, you will be able to:

- State rules that should be followed when writing/editing course content to make the content more clear and effective for learning.
- Use the Module Plan Checklist to ensure that all of the required elements for a lesson are included in the content.
- Describe the elements of the Participant Format.

## Rules For Writing/Editing Content

To ensure that content is clear, logical and easy to understand, keep the following points in mind:

- ***Course Design Elements*** **-** Make sure that each course includes the required learning elements for consistency in appearance and learning including:
  - Cover page.
  - Table of contents.
  - Course overview and objectives.
  - Modules (course content).
  - Summary of the course.
  - Glossary, forms, and exhibits (as required and time permits).
- ***Module Design Elements*** **-** Make sure that each module includes the following learning elements:
  - Sound and detailed learning objectives.
  - An overview of the module.
  - Content.
  - Activities, exercises, case studies, etc.
  - Summary.
  - Resources.
- ***Text*** **-** Keep text clear and concise so the content is easy to understand. When content is concise and easy to understand, courses can be used as reference material after the class.
- ***Samples and Examples*** **-** Provide samples and examples where appropriate to reinforce concepts and add realism to the course content.

- ***Logical Flow of Information*** **-** Keep the flow of your materials logical. Concepts that are not presented in a logical flow can confuse the learner and inhibit learning.
- ***Case Studies, Exercises and Activities*** **-** Use case studies, exercises and activities whenever appropriate to emphasize points and encourage learners to participate in the learning process.
- ***Relevance*** **-** Make sure that all information presented in the course is relevant and applicable to the learner. Presentation of extra information can be confusing and prevent learners from focusing on the important concepts.
- ***Varied Presentation*** - Try to vary the way in which information is presented to keep learners interested and focused.
- ***Handouts, Articles, Supporting Materials*** **-** Be prepared with applicable handouts, articles and supporting materials to reinforce your ideas. These materials can strengthen the concepts presented and add variety to the course presentation.

## Module Plan Checklist

The Module Plan Checklist can help designers check for missing elements, relevance, and clarity in lessons. After completing your course design on a new lesson or editing an existing one, use the checklist to ensure that you have included all the proper elements in the lesson.

- The module clearly states one or more learning objectives.
- The module objectives are based on the course objectives.
- The objectives state conditions and criteria that help measure whether objectives have been achieved.
- The introduction contains information that motivates participants and orients them to the module objectives.
- The number of teaching points is appropriate to meet the module objectives in the allotted time.
- The course content is clear, concise, relevant, and presented in a logical manner.
- Graphics are appropriate and are used to support the stated objectives.
- Activities and techniques used in the class support the learning objectives.
- Samples and examples are used in an appropriate manner and support the stated learning objectives.
- The lesson includes a variety of activities.
- Learners are given ample opportunity to participate and apply what they have learned.
- The transparencies are relevant, appropriate and clear.
- The summary reinforces key concepts presented.
- The time frames are noted and appropriate in order to complete activities.

## Exercise: Using the Styles in the Participant Template

After designing and writing your course you will be ready to format the contents so that the material is easy to follow and read. A format template uses a variety of "styles" to achieve this affect. In this exercise, you will practice using a format template to format your course content.

1. Review one of the modules of this course to see how a consistent format template is used.
2. Obtain a format template worksheet from the facilitator.
3. In your group, complete the worksheet by writing in all the headings that will appear in the module you are writing in this class, in the order that they appear. You should include at least the following:
    - Header (name of your module).
    - Overview Learning.
    - Learning Objectives Headings 1 (sufficient to handle all the major topics included in the module).
    - Headings 2 (to add appropriate subheadings and clarify larger topics).
    - Exercises (if appropriate).
    - Summary.
4. Review your worksheet with the class.

## Summary

In this module, you learned:

- Rules that should be followed when writing/editing course content to make the content clearer and more instructionally sound.
- How to use the Module Plan Checklist to ensure that all the required elements for a lesson are included in the content.
- How to apply a format template to a course.

The information in this module ensures that you create training materials that are easy and logical to follow so that the content will be more understandable.

# *Module 6:*

*Overviews*

# Table of Contents

# Overviews

## Overview

An overview is an introduction that motivates participants by generating interest in the topic about to be presented. An overview should provide a framework for learners. This framework helps learners retain and use new information that is presented to them.

## Learning Objectives

Upon the completion of this module, you will be able to:

- Explain the purpose of overviews.
- Describe what elements go into writing a good overview.
- Determine when an overview should be used.
- Write a meaningful overview.

## What Makes a Good Overview?

A good overview should have the following characteristics:

- ♦ Be short, simple, and straightforward.
- ♦ Has no more than a few paragraphs in length for a course or a few sentences for a new module or idea.
- ♦ Get the learner’s attention without providing too much detail.
- ♦ Present a synopsis of the basic content of the course, module, or topic about to be presented (graphics can be excellent communicators in an overview).
- ♦ Provide an understanding of how the content can be useful to the learner or answer the learner’s question, “What’s in it for me?”

## When Should an Overview Be Used?

In most cases, an overview should be provided at the following points in a course:

- ***At the beginning of the course*** **-** to provide participants a "big picture," preface the direction and purpose of the course and provide a context for new information being presented.

- ***At the beginning of each module*** **-** to give participants a solid understanding of where the information they are about to learn fits into the "big picture".

- ***Before explaining difficult concepts or ideas*** **-** to present a basic, easier-to-understand concept and then build upon the concept with more difficult information.

## Exercise: Writing a Course Overview

***Instructions:***

Using the information presented in this module as a guide, write an overview for the ***course*** you are currently developing.

## Exercise: Writing a Module Overview

***Instructions:***

Using the information presented in this module as a guide, write an overview for the ***module*** you currently have under development.

## Summary

In this module, you learned:

- The purpose of overviews.
- Components of a good overview.
- When on overview should be used.
- How to write a meaningful overview.

The information in this module helps you set a context for participants to accept new concepts and skills.  Writing effective overviews gives participants a road map for what concepts they will learn.

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# *Module 7:*

*Summaries*

# Table of Contents

**MODULE 7: SUMMARIES**

# Summaries

## Overview

A summary is a synopsis of a course or module. Summaries reinforce the thoughts, ideas, and concepts presented during training to form a single, cohesive picture for the learner.

## Learning Objectives

Upon the completion of this module, you will be able to:

- ♦ Explain the purpose of a summary.
- ♦ Describe the elements for writing a good summary.
- ♦ Determine when a summary should be used.
- ♦ Write a meaningful summary.

## What Makes a Good Summary?

A good summary should have the following characteristics:

- Be short, simple and straightforward.
- Be no more than a few paragraphs in length for a course or a few sentences for a new module idea.
- Summarize the major points presented without providing too much detail.
- Review the basic content of the course, module or topic presented.
- Reinforce how the content can be useful to the learner.
- Parallel the overview of the course or module.

## When Should a Summary Be Used?

In most cases, a summary should be considered at the following points:

- ***At the end of the course*** -- to bring all the components of the course together to reinforce the “big picture” presented in the overview.

- ***At the end of each module*** -- to strengthen the learner’s understanding of how the information they have learned correlates to the entire course and can be useful to them.

- ***After explaining difficult concepts or ideas*** -- to ensure that the learner understands all aspects of the concept or idea presented before moving on to other information.

## Exercise: Writing a Module Summary

***Instructions:***

Using the information presented in this module as a guide, write a summary for the ***module*** currently are developing.

## Summary

In this module, you have learned:

- The purpose of a summary.
- The elements necessary for writing a good summary.
- When a summary should be used.
- How to write a meaningful summary.

Writing effective summaries helps participants to summarize content points in their minds. Summaries also prepare the learner for the next module, since he/she has mentally ended a section of content and will be prepared for the next section of content.

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# *Module 8:*

*Instructor Guide*

# Table of Contents

# Instructor Guide

## Overview

An Instructor Guide is an important tool that instructors use when conducting a training course. Typically, the guide provides instruction about presenting content, conducting discussion groups or sessions, and facilitating exercises. An instructor guide can be lengthy and detailed or short and concise.

Instructor Guide should be no more than 10-12 pages in length (depending on the length of the course) and should provide specific details required to conduct the course. Instructor Guide provides added insight to the instructor to ensure that he/she delivers content or leads an activity in the most effective way possible.

## Learning Objectives

Upon the completion of this module, you will be able to:

- Describe the level of detail that should be used to write the Instructor Guide.
- Describe the elements that should be included in Instructor Guide.
- Write effective Instructor Guide.
- Use the Instructor Guide Template.

## Elements of the Instructor Guide Document

A template has been developed in Microsoft Word 6.0 that helps guide each developer in writing Instructor Guide. A good set of Instructor Guide should include:

- A brief description of each module in the course (one to three sentences).
- The estimated length of time to teach each module.
- Important notes that the instructor should be aware of when teaching the course.
- A description and list of instructions for each exercise; answers to exercises, if needed.
- A description of all case studies, important points that should be brought out for each case, and possible outcomes.
- A list of resources required to complete each module (books, job aids, video tapes, handouts, transparencies, computer equipment, etc.).

# Instructors Guide Document
# (Sample Page)

**Module # - Module Name**

| | |
|---|---|
| **Overview** | Insert one to three ***brief*** sentences describing the purpose of this module. |
| **Estimated Teaching Time** | This module should take _____ minutes to complete.<br>***Note:*** *You may break down the time required to complete individual pieces of the module if appropriate.* |
| **Important Notes About This Module** | Insert the following (as required) in enough detail for another instructor to teach the course if they are familiar with the course content:<br>♦ Method/Content<br>♦ Explanations<br>♦ Notes<br>♦ Key points |
| **Exercise: *Insert Name*** | Insert a brief description of the exercise and its purpose.<br>***Instructions:***<br>Insert instructions that the instructor must know to explain the exercise to the students and any special notes required to facilitate the exercise.<br>***Results:***<br>Insert the appropriate answers/responses to the exercise. You may attach a copy of the exercise to the instructor guide with answers provided and make references to the copy. |
| **Case Study: *Insert Name*** | Insert a brief description of the case study and its purpose.<br>***Instructions:***<br>Insert instructions that the instructor must know to explain the case study to the students and any special notes required to facilitate the case study.<br>***Results:***<br>Insert the appropriate answers/responses to the case study. You may attach a copy of the case study to the instructor guide with answers provided and make references to the copy. |

## Exercise: Critique Instructor Guide

***Instructions:***

1. Review the sample Instructor Guide on the following page.
2. With your group, complete the Critique Questions below.
3. Review your critique with the class.

### *Critique Questions*

1. Does the overview give a clear and concise description of what will be included in the module?

2. Is a purpose for the exercise stated?

3. Are the exercise instructions clear? Why or why not?

4. Are the case study instructions clear? Why or why not?

5. From the description of the case study, can you tell what the goal of the case study is?

6. What information do you think needs to be added to these Instructor Guide?

7. What information in the Instructor Guide do you think is extraneous?

## Exercise: Critique Instructor Guide, continued

### Module #1: Operating a Teller Station

| | |
|---|---|
| **Overview** | This module covers procedures for operating a teller station. The module provides a step-by-step procedure for daily operations and ideas for doing efficient and accurate work. |
| **Estimated Teaching Time** | This module should take 6 hours to complete. |
| **Important Notes About This Chapter** | ♦ Explain each page of the participant material that does not contain an exercise.<br>♦ Notes for each section are found in the gray portions of the Leader's Participant Guide.<br>♦ Key points:<br>✓ Employees must follow the standard procedures.<br>✓ Employees must follow the priorities of work performance. For example, the cash drawer must be balanced at the end of each day, so it takes priority over finishing the month-end report.<br>✓ Employees are expected to ask for procedure updates on a monthly basis. |
| **Exercise:** ***Balancing the Cash Drawer*** | Participants will practice balancing a cash drawer.<br><br>***Instructions:***<br><br>Review instructions to the activity with participants. Distribute materials to complete the exercise. Allow 30 minutes for participants to complete.<br><br>***Results:*** (answers to exercises inserted here) |

**Case Study:**
***Bank A Serves the Community***

The Bank A has been serving the community for 15 years. Recently they have received complaints about the errors by the tellers. The Service Team has been instructed to come up with a plan to improve the bank's teller error problem.

***Instructions:***

Divide participants into group of three-four participants. Instruct groups to use the information in the Case Study Scenario to determine a plan of action to improve the bank's teller operations. When all groups have completed the written portion of the exercise, ask them to share their answers with the rest of the class.

***Results:*** (Appropriate answers inserted here).

## Exercise: Writing an Instructor Guide

***Instructions:***

Using the information presented in this module, complete the following steps to write a portion of your Instructor Guide.

1. Obtain the ***Instructor Guide Template*** from the facilitator.
2. Complete the applicable portions of the template for the module you are currently developing.
3. Review your document with the others in the course.

## Summary

In this module, you learned:

- The level of detail required to write good Instructor Guide.
- The elements that should be included in Instructor Guide.
- How to write effective Instructor Guide.
- How to use the Instructor Guide Template.

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# *Module 9:*

## *Transparencies*

# Table of Contents

**MODULE 9: TRANSPARENCIES**

# Transparencies

## Overview

A transparency should reinforce a topic, concept or point being presented in the class. Transparencies are an aid for the instructor since they prompt him/her to cover important points. Transparencies are an aid for the learner since they provide a visual reinforcement of content being presented in a lesson or discussion.

## Learning Objectives

Upon the completion of this module, you will be able to:

- ♦ List ten reasons for carefully designing visual aids.
- ♦ Describe the points that go into making a good transparency.
- ♦ Use a transparency template to create an effective transparency.
- ♦ Complete the applicable portions of the Module Plan.

## Reasons For Carefully Designing Visual Aids

In his book, *Presentations Plus*, David A. Peoples, a consulting instructor for IBM, states that people gain 75% of what they know visually, 15% through hearing and 10% through smell, touch, and taste. Peoples also states that a picture is three times more effective than words alone and words and pictures together are six times more effective than words alone.
For these reasons visual aids (including transparencies) must be carefully planned. Visual aids should accomplish the objectives listed below.

1. ***Attract and Maintain Attention*** **-** The average individual speaks 110 to 160 words per minute but thinks at the rate of 400 to 500 words per minute. Visual stimulation can help participants stay interested in the presentation.
2. ***Reinforce Main Ideas*** **-** Participants tend to place a lot of emphasis on what they see. Focus on placing the main points in the visual aid.
3. ***Illustrate and Support the Spoken Word*** **-** Keep in mind that a picture is worth a thousand words.
4. ***Minimize Misunderstanding*** **-** Visuals can give meaning to points that may be missed in the spoken word.
5. ***Increase Retention*** **-** Remember the words of Confucius: “What I hear, I forget; what I see, I remember; what I do, I understand.” Learners have to remember something in order to use it.
6. ***Add a Touch of Realism*** **-** When you cannot have all the supporting materials that you would like in the classroom to help the learner visualize the real world, good visuals can add a realism to the academic setting.
7. ***Save Both Time and Money*** **-** Visuals help us communicate more quickly and clearly reducing the amount of time required to teach a point but increasing learner retention.
8. ***Aid in Organizing Your Thoughts*** **-** Visuals help create a logic path for thinking.
9. ***Ensure That Key Points Are Covered*** **-** Visuals can help ensure that all key points are covered in sufficient detail and that information is not missed or skipped.
10. ***Build the Confidence of the Instructor*** **-** Knowing that the instructor does not have to rely solely on memory to teach a course can lend a sense of confidence to the instructor.

## What Makes a Good Transparency?

Consider the following points when creating transparencies for a course:

- ***Create a visual picture* -** Each transparency presented in a course should paint a visual picture for the learner, reinforce important concepts, and tie together information presented in the course.
- ***Don't copy the participant's guide* -** Transparencies are not a medium to copy the information presented in the participant's guide on a screen. Summarize, condense, and reword important concepts.
- ***Use graphics whenever possible* -** A picture can speak a thousand words.
- ***Don't overwhelm the learner* -** Keep the amount of text and number of graphics to a minimum. Use multiple transparencies to present complex ideas.
- ***Limit number content items to seven* -** Learners cannot keep more than seven items in short-term memory, so any more than that on a transparency will be forgotten.
- ***Use large font* –** Learners should be able to clearly see the transparencies even from the back of the room. If your facilities do not allow for this, include the slides into the Participant Guide.

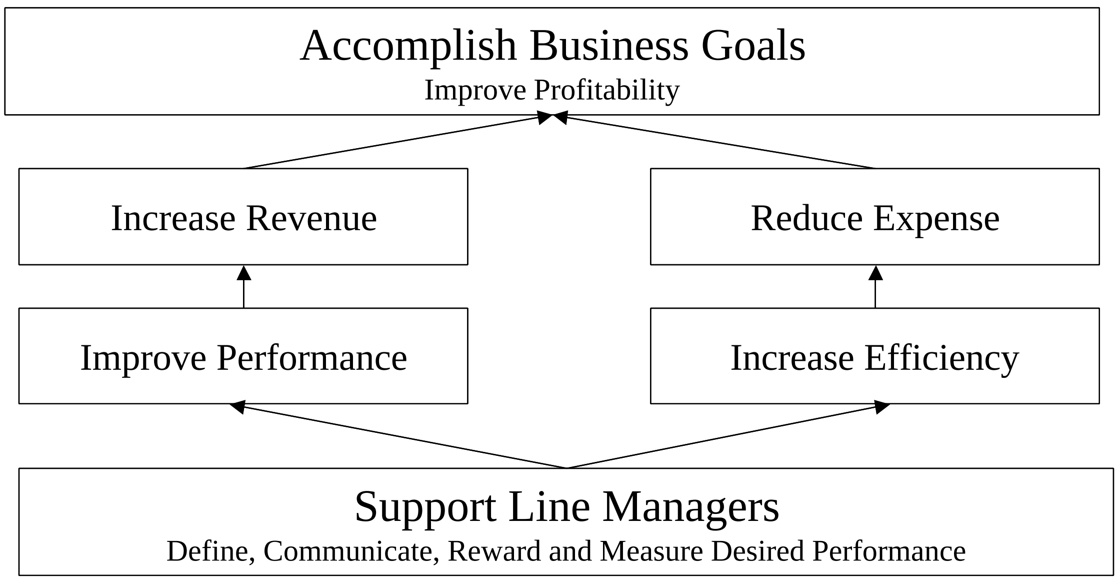
***Examples***

Review the following examples of a few effective transparencies.

# Teller Operations

- ✓Follow Procedures
- ✓Take Time With Each Transaction
- ✓Check Your Work
- ✓Ask For Assistance When Necessary

# How the Human Resource Function Supports Business Goals



## Exercise: Creating Transparencies

***Instructions:***

Using the information presented in this module, complete the following steps to create three transparencies for the module you are developing.

1. Obtain the ***Transparency Template*** from the instructor.
2. Create three transparencies for your module.  Try to choose a variety of topics that will allow you to create different looks, e.g., one with a graphic illustration, one with condensed bullet points.
3. Review your transparencies with others in the course.

## Exercise: Completing the Module Plan

***Instructions:***

Transfer the following information to your Module Plan.

1. Insert an explanation of each transparency prepared in the previous exercise in the Resources section of your Module Plan.

## Summary

In this module, you learned:

- The points that go into making a good transparency.
- How to use the transparency template to create an effective transparency.
- How to complete the applicable portions of the Module Plan related to transparencies.

Effective transparencies ensures that learners gain the most from the classes they attend. The visual reinforces information presented to the learner.

# *Module 10:*

## *Training Worth the Time and Investment*

## *"Return on Investment"*

# Table of Contents

# Training Worth the Time and Investment "Return on Investment"

## Overview

Training is an investment in the future profits of the companies they work for. Justifying the time and investment in training ensures that training programs can continue. Often the value of an investment is referred to as a Return on Investment (Return on Investment).

## Learning Objectives

Upon the completion of this module, you will be able to:

- Explain the importance of measuring the value of training.
- Perform simple measures of Return on Investment for training.
- Explain how effective training supports the Return on Investment of training.

## The Importance of Measuring the Value of Training

The value of training can be measured by comparing the costs of the training to the benefits derived from training. Benefits can be hard to identify and measure; however, finding measurable benefits of training is key to ensuring that training programs continue.

With the changing economic climate and global economy, companies must be profitable and competitive to survive. How companies spend money and time impacts their profitability. Training expenses must be justified in order for management of the training function to be supported monetarily and for programs to continue.

Measuring the value of training can be difficult, since so many factors affect whether training participants use what they have learned. A simple way to measure the Return on Investment of training is shown in the following pages.

## How to Measure Training Return on Investment

Training Return on Investment is a measure of whether the monetary value of the results of training exceeded the cost for the program. Return on Investment can be measured in terms of three factors. These factors are listed below:

- Economic Value Added (EVA)
- Client Value Added (CVA)
- People Value Added (PVA)

### *Economic Value Added*

EVA is measured in absolute numbers. The following are some examples of absolute number measurements:

- Increased sales, for example, if sales people are trained to sell better, they will generate more revenue by making more sales;
- Operations efficiencies, for example, if employees learn how to work more efficiently, it might take one employee to do the job that two had to do, so that the company saves money in salaries.

### *Client Value Added*

CVA can be measured in terms of client satisfaction indexes and market share increases. For example, if employees receive client service training, customers could be polled about how they are treated before and after training to determine how well the training worked.

In addition, the market share could improve; for example, a bank might train sales representatives to explain the benefits of banking with their bank, so that more customers decide to bank there. As a result the bank's market share would increase.

### *People Value Added*

Three measures for PVA are turnover of employees, productivity of employees and the diversity index of employees.  Often employees will stay at a company longer if they feel competent about the work they are doing.  This feeling of competency can be fostered by training.

Employees can be more productive by learning to do their jobs better.  For example, if workers in a car manufacturing plant learn how to build cars faster, more cars will be built in a day, which will affect company revenues.

The diversity index indicates how well employees are cross-trained in several functions.  For example, a teller who is very good at working accurately could be cross-trained as a trainer in order to teach others how to process transactions accurately.

## Methods for Collecting Post-Training Data

Some methods for collecting post-training data, in order to determine the benefits of training include:

- **On-the-job observation**

  *For example: A supervisor watching an employee perform a manufacturing task that was taught in the training.*

- **Follow-up surveys or questionnaires**

  *For example: Questionnaires filled out by co-workers or supervisors concerning the employee's improved skills, or filled out by the employee concerning his or her own ability to perform a task.*

- **Interviews with participants**

  *For example: Verbal interviews with participants about how they have used a skill or knowledge they gained in training.*

- **Follow-up focus groups**

  *For example: Focus group with customers, at some point several months after training, concerning the quality of a videotape on investing.*

- **Performance monitoring**

  *For example: A supervisor monitoring the way an employee handles telephone calls after training.*

## Converting Post-Training Data to Monetary Value

Converting data to a monetary value can be a challenge. Some direct conversions of data to monetary value include:

- Improved rate of sales.
- Fewer incomplete transactions and therefore improved cashflow.
- Saved employee time due to improved efficiency of work performed.
- Increased revenue due to employees producing more transactions in a day.

## Cost for Training

Some costs of training include the following:

- Curriculum development costs, including time to design and write the training.
- Materials for training and for development of training, including workbooks, transparencies, etc.
- Instructors' time, including salary and benefits.
- Facilities and equipment.
- Travel/Lodging/Meals.
- Participant salaries and benefits.
- Administrative costs and overhead.

## Calculating Return on Investment

The ratio for Return on Investment shows net training program benefits compared with program costs. Net program benefits are calculated by subtracting program costs from program benefits. An example calculation is shown below.

### *Training Benefits*

Increased sales = 160,000,000 Cedi additional revenue per year*

*Cost of goods sold for this amount is 15,000,000, so the net revenue = 145,000,000 Cedi.

Increased quality of production, less materials wasted per year = 20,000,000 Cedi.

***Total training benefits = 145,000,000 + 20,000,000 = 1,65000,000 Cedi.***

### *Training Costs*

Training curriculum development = 80 hours at 100,000 Cedi per hour (employee's salary prorated to an hourly wage) or 8,000,000 Cedi.

Training facilities rental (2 days at 1,000,000 Cedi a day) = 2,000,000 Cedi.

Training materials (20 books at 200,000 Cedi each) = 4,000,000 Cedi.

Trainer (for training delivery) cost = 2 days at 1,000,000 Cedi per day or 2,000,000 Cedi.

***Total training costs = 1,6000,000 Cedi.***

### *Return on Investment Calculation*

Net training program benefits = 165,000,000 Cedi – 16,000,000 Cedi = 149,000,000 Cedi.

***Return on Investment*** = 149,000,000 Cedi/16,000,000 Cedi = ***9.31*** return on investment or 9.31 times the value for the amount of money invested.

## Exercise: Calculating Return on Investment

***Instructions:***

Work with your group to use the information below to calculate Return on Investment for training.

**Expenses**

Training employee salary prorated to hourly basis.......................60,000 Cedi.
SME employee salary prorated to hourly basis............................75,000 Cedi.
Training employee hours preparing class............................................60.
SME employee hours preparing class ................................................90.
SME employee hours presenting class ...............................................12.
SME employee hours lost from regular duties....................................60.
Training materials (25 at 175,000 Cedi each).........................4,375,000 Cedi.
Training facilities (700,000 Cedi a day for 2 days) ................1,400,000 Cedi.

**Benefits from Training**

Increased sales due to training........................................... 175,000,000 Cedi.
Cost of sales...................................................................... 35,000,000 Cedi.
Quality Improvements time savings hours per year ..........................700.
Average employee hourly wage associated with time savings......35,000 Cedi.

**Return on Investment Calculation**

Total Training Benefits:

Total Costs for Training:

Total Training Benefits – Total Costs for Training:

Total Training Benefits – Total Costs for Training/ Total Cost for Training:

## Exercise: Action Planning

***Instructions:***

1. Consider a recent training program you have worked on.
2. In the space provided, list the expenses associated with the project.
3. In the space provided, estimate the benefits the training could provide the training participant's firm.
4. Calculate estimated Return on Investment.

**Expenses**

Training employee salary prorated to hourly basis........................................ ____________
Training materials.......................................................................................... ____________
SME salary prorated to hourly...................................................................... ____________
Employee hours preparing and delivering class ............................................ ____________
Employee (SME) hours lost from regular duties ...........................................____________
Training development hours ......................................................................... ____________
Training facilities........................................................................................... ____________
Other expenses: ............................................................................................ ____________

**Benefits from Training**

Increased sales due to training ........................................................................ ___________
Cost of sales................................................................................................... ___________
Quality Improvements time savings hours per year ........................................ ___________
Average employee hourly wage associated with time savings.......................... ___________
Other ............................................................................................................. ___________

**Potential Return on Investment from Training**

## Effective Training Supports Return on Investment

Effective training supports training Return on Investment in various ways. Effective planning of resources will ensure that time and expense of participants are not wasted. Training that is applicable to the job and well designed will create benefits that save or make the company more money. Creating infrastructures that support the concepts and skills introduced in training will ensure that participants' time spent in training was worthwhile.

### ***Planning = Savings***

The following is a list of ways that planning can save time and resources:

- Employing subject matter experts to help in developing training.
- Planning the actual delivery of classes so that facilities and travel expenses are minimized.
- Designing training before writing ensures that the development process is more efficient.

### ***Training that is Applicable***

- Conduct a Training Needs Assessment to ensure that training is the best solution for a problem.
- Use the Training Needs Assessment to design the right training.

### ***Infrastructures***

- Coaching after training.
- Reviewing skills improvement at intervals after training.
- Tying training to job performance.

## Summary

In this module, you learned:

- The importance of measuring the value of training.
- Simple measures of Return on Investment for training.
- How effective training supports the Return on Investment of training.

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# *Module 11:*

## *Course Development/Skill Practice*

# Table of Contents

# Course Development/Skill Practice

***Instructions:***

1. Based on all you have learned in this class, complete the Module Plan that you started at the beginning of class.
2. Using the completed Module Plan, finish a 15-30 minute portion of the course that you can deliver to the rest of the class. Ensure that the portion you develop includes clear learning objectives and all components required for effective training.
3. Practice delivering the portion of the course that you develop so that you can deliver it to the rest of the class.

## Evaluation Sheet

***Instructions:***

As you observe your colleague deliver the training that he/she wrote, complete the questions below:

1. Were the objectives of the lesson clearly stated?

2. Were you able to follow the content presented?  Why or why not?

3. Did the module or lesson maintain your interest?

4. What was particularly effective about the presentation or module?

5. How would you suggest improving the module?

6. What advice would you give the instructor before teaching again?

KPMG Consulting
Barents Group

# Course Summary

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**COURSE SUMMARY**

# Course Summary

## Notes from Question and Answer Period

## Action Plan

***Instructions:***

Use the template below to plan how you will apply what you have learned. This plan should be shared with your Instructor and Manager upon returning to your job so that they can support you in your follow-up activities.

***What I need to do to apply what I learned***

*Write down some things you can do to apply what you have learned. For example, "Use the Course Design Worksheet every time I develop a course."*

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***Specific action steps I will take to finish the course that I started in this class***

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# CURRICULUM DEVELOPMENT COURSE EVALUATION

### *Give Us Your Feedback*

1. Please rate the content of this course in relation to its importance to your instructor job and in relation to its helpfulness in meeting your needs and expectations.

| LEARNING OBJECTIVE<br>Participants will be able to: | IMPORTANCE TO YOUR INSTRUCTOR JOB | | | | | | MET YOUR LEARNING NEEDS | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Not at all | | | | | Highly important | Not at all | | | | | Totally met |
| 1. Explain the course design and development process. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 2. Conduct a training needs assessment. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 3. Design activities for training that will create learning that meets learning objectives. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 4. Write learning objectives that are measurable. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 5. Explain the importance of varied learning methods and create training activities using those varied learning methods. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 6. Write course content that supports learning objectives. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7. Write effective overviews and summaries of content. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 8. Write effective Instructor Notes. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 9. Create transparencies and visuals that support learning objectives. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |
| 10. Explain the Return on Investment of training. | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 |

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| | Below Expectations | | | | | Above Expectations |
|---|---|---|---|---|---|---|
| 2. Please rate the instructor's abilities to: | | | | | | |
| a. Encourage group discussion and involvement | 1 | 2 | 3 | 4 | 5 | 6 |
| b. Explain concepts clearly and concisely | 1 | 2 | 3 | 4 | 5 | 6 |
| c. Relate the module concepts to your position | 1 | 2 | 3 | 4 | 5 | 6 |
| d. Have knowledge of the subject | 1 | 2 | 3 | 4 | 5 | 6 |
| 3. Please rate the course materials and overheads: | | | | | | |
| a. Participant Materials | 1 | 2 | 3 | 4 | 5 | 6 |
| b. Overhead Transparencies | 1 | 2 | 3 | 4 | 5 | 6 |
| 4. Overall Reaction | | | | | | |
| a. Course | 1 | 2 | 3 | 4 | 5 | 6 |
| b. Instructor | 1 | 2 | 3 | 4 | 5 | 6 |
| c. Materials | 1 | 2 | 3 | 4 | 5 | 6 |

5. Comments and Suggestions (Please use back side of paper if necessary):